



Fact Sheet: 2009 Filing Season ReadyReturn

□ **What is ReadyReturn?**

- ReadyReturn is our free service that provides taxpayers with a completed tax return for their final approval and submission.
- ReadyReturn is designed for taxpayers with simple tax returns.
- Taxpayers may accept the return as completed, make changes, or choose to use another filing method entirely.
- We use the information we already have such as W-2 information, address, and filing status to complete the return.

□ **How do taxpayers find out if FTB completed a ReadyReturn for them?**

- Visit our website at ftb.ca.gov or call 800.338.0505.

□ **Who is eligible to use ReadyReturn?**

- Taxpayers may qualify for ReadyReturn if they filed a 2007 California resident return with:
 - Single or head of household filing status.
 - No more than five dependents.
 - The standard deduction.
 - Claim no special credits other than the Renter's Credit.
 - Income from wages only.
 - Taxpayers must have had only one employer in 2008.
- New this year, taxpayers who can be claimed as a dependent on another person's tax return may qualify for ReadyReturn.

□ **What are the benefits of ReadyReturn?**

- ReadyReturn is a free, easy, direct-to-government filing option that gives taxpayers the option to file electronically or on paper. ReadyReturn is based on a simple premise: we can use the information that we already have, such as W-2 information, to provide taxpayers with a completed return for their final approval and submission. We do most of the work, so taxpayers benefit.

❑ **What do taxpayers think of ReadyReturn? (Comments are from taxpayer surveys.)**

*This is the simplest, most convenient tax filing system ever. I really am impressed.
Thanks for including me in the pilot program.*

It made my simple tax return a COMPLETE no-brainer.

This is great and easy to use.

Wonderful. Wish the Feds would make it this easy.

❑ **What if taxpayers don't qualify for ReadyReturn?**

- Taxpayers may use CalFile, our user-friendly, free, online filing program. It allows taxpayers to e-file their returns quickly and securely – direct to FTB. CalFile eligibility requirements are:
 - Any filing status.
 - California resident for the entire year.
 - Original tax return for current tax year.
 - Up to 10 dependents.
 - Federal AGI up to:
 - \$163,187 for single and married filing separately taxpayers.
 - \$244,785 for head of household taxpayers.
 - \$326,379 for married/Registered Domestic Partners (RDP) filing jointly and qualifying widow(er) taxpayers.
- CalFile also accepts itemized deductions and some tax credits.

❑ **Volume of ReadyReturns received by process year (PY)**

PY 2005 – 11,620.

PY 2006 – 10,580.

PY 2007 – No pilot or program ran this process year.

PY 2008 – 11,253.

PY 2009 – 30,000 (projected).

❑ **Contact us:**

- Franchise Tax Board
Public Affairs Office
916.845.4800